

CHAPTER 21

**PRIVATE LAND MANAGEMENT PLANS**

A forest management plan is a written evaluation of a property that provides a description of the resource, its condition and recommendations for applied management prescriptions along with a timetable for implementation.

Plans take many forms and fulfill different needs. They may address one specific management practice or encompass any number of practices. The form and type of plan used depends on the forester's judgment, the amount of acceptance of the owner and the need to sell the owner on management. Forest management plans must be tailored to the individual needs and objectives of the owner to achieve results.

**Basic Plans**

Basic plans address a specific management practice or practices and may be in the form of a letter or summary of prescriptions. They are often used as a follow-up to an initial contact when the interest and commitment of the owner is not well established. The basic plan is a tool to reinforce verbal recommendations and encourage action by the owner.

**Comprehensive Plans**

Managed Forest Law plans and Forest Stewardship plans are comprehensive in nature. They should consider the management of the total forest resource for all benefits, dependent upon the land capability and the objectives of the landowner. They identify and describe activities that will enhance or protect soil, water, aesthetic quality, recreation, timber, water, and fish and wildlife resources based on the landowner's objectives for the land. Managed Forest Law plans must conform to requirements in state statutes and administrative rules. The State Forest Stewardship Committee establishes the required elements of Forest Stewardship plans. As a result, there may be some differences between the two types of comprehensive plans.

**General Considerations in Preparing a Forest Management Plan**

1. Tailor the plan to the landowner's individual needs and objectives within the capability of the land. Be personal. Consider the landowner's goals, interest, motivation and needs in relation to the potential of the woodland. Tell the owner how carrying out the plan will help reach the goals. Make prescriptions in accordance with the silvicultural guidelines in department handbooks and directives.
2. Avoid technical forestry terminology or define all technical terms used. Use understandable terms and symbols. Use written (plain language) explanations rather than timber-type symbols. Convey technical information in a non-technical manner.
3. Base the plan on ecosystem considerations. Include an overview of regional landscape scale concerns as appropriate.
4. Be concise. Assure that the included information is relevant to the parcel and accurate.
5. Use publications or other attachments to describe routine, repetitive information, i.e. "How to Sell Timber"; "What is TSI"; "Tree Planting", etc. Reference the supplemental information in the plan.
6. Explain services available from DNR, cooperating foresters, county land conservation departments, Farm Service Agency, UW-Extension, Natural Resources Conservation Service, wood cooperatives, private associations, private enterprise, and others to help carry out the plan.
7. Determine a timetable with the landowner for accomplishing needed forestry practices.

### Specific Plan Standards

The following Wisconsin Forest Management Plan Standards Table and the MFL Review Checklist list are recommended and required elements in forestry plans. All plans shall adhere to the [Best Management Practices for Water Quality \(BMP\)](#) and silviculture principles established in [Publication FR-226, Wisconsin Forest Management Guidelines \(FMG\)](#).

<b>WISCONSIN FOREST MANAGEMENT PLAN STANDARDS</b>				
* Foresters should include components in addition to those designated in the chart as appropriate to the situation for each individual basic plan.				
		<b>Managed Forest Law Plan</b>	<b>Forest Stewardship Plan</b>	<b>Basic Plan*</b>
	<b>Plan Component</b>			
<b>1.</b>	<b>IDENTIFICATION</b>			
A.	Landowner name, address, with necessary signatures and dates	<b>Required</b>	<b>Required</b>	<b>Required</b>
B.	Landowner signature of approval	<b>Required</b>	<b>Required</b>	As Appropriate
C.	Plan preparer name, address, and phone number	<b>Required</b>	<b>Required</b>	<b>Required</b>
D.	Plan preparation date	<b>Required</b>	Recommended	<b>Required</b>
E.	Legal description (T,S,R minimum)	<b>Required</b>	Recommended	<b>Required</b>
F.	Planned acres	<b>Required</b>	<b>Required</b>	<b>Required</b>
G.	Plan length (shows number of years covered by the plan)	<b>Required</b>	Recommended	As Appropriate
H.	Overall landowner goals and objectives for the property	<b>Required</b>	<b>Required</b>	Recommended
I.	The pages are numbered sequentially/ order # on all pages	<b>Required</b>	Recommended/NA	As Appropriate
<b>2.</b>	<b>DESCRIPTION (may be presented in a narrative or tabular format as appropriate)</b>			
A.	Map with property boundaries, cover types, water, roads, adjoining land use, acreage, etc., clearly and adequately labeled	<b>Required</b>	<b>Required</b>	Recommended
B.	General property description	Recommended	<b>Required</b>	As Appropriate
C.	Regional landscape overview	Recommended	<b>Required</b>	As Appropriate
D.	Interaction with surrounding properties	Recommended	Recommended	As Appropriate
E.	Soils information (can be generalized over entire property when soils are uniform; may be included in a data table)	<b>Required</b>	<b>Required</b>	As Appropriate
F.	Stands by cover type and area (acres)	<b>Required</b>	<b>Required</b>	<b>Required</b>
G.	Descriptive overview of the timber type	<b>Required</b>	Recommended	Recommended
H.	Stand silvicultural objective ( <b>what</b> you are trying to grow <b>and how</b> you intend to achieve it: indicate target timber type or land cover and the even-age or all-age technique that will be used to get there). Provide a link to landowner's objectives where practical.	<b>Required</b>	<b>Required</b>	<b>Required</b>

		<b>Managed Forest Law Plan</b>	<b>Forest Stewardship Plan</b>	<b>Basic Plan*</b>
I.	Forest characteristics: Land Exam Form 2450-128 Part A (and part B for MFL) or similar stand-based table (Providing a copy to the landowner is recommended, though not required.)	<b>Required</b>	<b>Required</b>	As Appropriate
J.	Plan addresses known threatened and endangered species and (when activities involve soil disturbance) cultural/historical resources	<b>Required</b>	<b>Required</b>	<b>Required</b>
<b>3.</b>	<b>MANAGEMENT ACTIVITIES</b>			
A.	Recommendations consider landowner's available time, interest, money, and energy based on landowner's objectives.	Recommended	Recommended	Recommended
B.	Plan identifies and describes actions (practices) to be taken by the landowner to protect soil, water, range, aesthetic quality, recreation, timber, and fish and wildlife resources in a manner that is compatible with landowner objectives.	<b>Required</b>	<b>Required</b>	Recommended
C.	MFL Mandatory Practices**	<b>Required</b>	N/A	N/A
D.	MFL Optional Practices**	<b>Required</b>	N/A	N/A
E.	Year practices should/must be completed (A chronological summary of mandatory or recommended activities is also desirable, but not required.)	<b>Required</b>	Recommended	Recommended
F.	Enforceable language: Specific requirements as appropriate (basal area residuals, trees per acre, follow-up requirements, etc.)	<b>Required</b>	N/A	N/A
G.	Prescriptions are consistent with WI DNR approved silvicultural standards	<b>Required</b>	<b>Required</b>	<b>Required</b>
H.	Gypsy moth control considerations	<b>Required</b>	Recommended	As Appropriate
<b>4.</b>	<b>PRESENTATION (IF ANY OF THE FOLLOWING CATEGORIES IS UNACCEPTABLE, THE PLAN MAY BE RETURNED FOR REVISIONS.)</b>			
	<ul style="list-style-type: none"> <li>• The plan information is presented in a logical format that is easy to follow.</li> <li>• The writing style is easy to read and understand and presented in a professional manner.</li> <li>• The writer reasonably avoids wordiness, jargon, and mistakes in grammar, spelling and formatting.</li> <li>• The plan meets the landowner's needs and provides useful advice in a skillful way.</li> </ul>			
	** Mandatory and Optional Practices are required to be included in MFL plans to the extent needed to address sound forestry and the landowners' objectives listed in the plan.			

**MFL Plan Review Checklist**

The following items are needed in a fieldwork packet for an MFL entry.

**Land Owner Name:** \_\_\_\_\_ **Order No:** \_\_\_\_\_

**Land Eligibility** (all answers must be True)

- Each parcel is at least 10 contiguous acres
- Each parcel is at least 80% productive
- Land is not in a city
- Land is not part of a recorded plat
- Land meets width requirement (120 ft. or 4:1 ratio)

True      False

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

**Entry Packet Complete**

- ✓Land Listing ✓Map (original) ✓Land Exam (original)
- ✓Plan (original and 1 copy) ✓Compete application (including deeds, tax bills, other important documents submitted by land owner)
- ✓Other pertinent documents/letters

<input type="checkbox"/>	<input type="checkbox"/>
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**Application (original):**

- Original application (as received from Madison)
- Signed by all owners listed on the deed(s) plus spouse(s) if applicable
- Lien holder and life estate holder signature present
- Land contract holder signature present
- Indicated if new entry or addition
- Indicated choice of contract lengths
- Indicated choice for open or closed acreage
- Deed(s) represent the acreage being entered & includes 100% of ownership
- Deed(s) show that all land being entered under same ownership
- No timber cutting restrictions on deed, or appropriate steps taken

YES      NO      N/A

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**Plan: (see plan checklist too)**

- Plan addresses everything on Plan Checklist
- Contract period correct
- County and municipality listed correct
- Legal description (Town, Range, Section) matches land listing, land exam & map
- Acreage (total) matches land listing, land exam and plan
- Addition: acres being added are clearly identified
- Pages numbered and includes correct order number on all pages
- Landowner objectives completed
- Gypsy Moth consideration included
- NHI reviewed and mentioned
- All landowner and spouses signatures present and original
- Forester's signature present and original

YES      NO      N/A

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**Land Listing:**

- Contact Landowner and address match land exam
- All owner's names listed in owner/address block or further down on form (Other Owners:)
- Owners listed match deed(s)
- Order # matches and on all pages of the entry packet
- Legal description (T., R., Section & Description.) matches map, land exam & plan
- Parcel Identification Numbers listed
- Certified Survey Map listed if applicable (Lot, CSM #, Volume and Page)

YES      NO      N/A

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Private Forestry Handbook

• Description codes correct (Handbook Appendix)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Acreage (open/closed/total) matches map, land exam and plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Addition: clearly shows acres being added	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Using whole acres in each legal description, unless entering all of owner's land in the description –OR- the land being entered/ excluded is surveyed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Denial code listed if entire entry is denied	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Map (original):</b>	<u>YES</u>	<u>NO</u>	<u>N/A</u>
• ½ inch blank margin at top, ¼ inch clear margin on sides and bottom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Neat, legible & proper scale (8" = 1 mile)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• One section per map	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Non standard sections – section corners & ¼ corners identified	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Correct Order number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Correct county and municipality listed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Appropriate type, size and density for each stand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Area(s) being entered highlighted with approved highlighter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Adjoining lands identified	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Buildings and areas excluded from entry are clearly identified	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Closed area identified and within acreage limits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Acreage (open/closed/total) matches land listing, land exam and plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Legal description (T., R., Section., and Description) matches land listing, land exam and plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Land Exam (original):</b>	<u>YES</u>	<u>NO</u>	<u>N/A</u>
• Landowner information matches land listing (only contact landowner will be listed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Correct Order number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Correct county and municipality listed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Legal description (T., R., and Section) matches land listing, land exam & plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• One Section per page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Acreage (total) matches land listing, land exam and plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• New entry or addition checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Landowner objective entered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Stand information complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Scheduled practices and codes match plans stand description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Non-productive acreage noted in remarks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Other important issues explained in remarks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Forester's signature (original)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### **Forest Management Plan Forms**

Non-tax law stewardship plans should be prepared on the Forest Stewardship Management Plan forms 2400-111, 2400-111A, and 2400-111B. The MFL Stewardship Forestry Plans must be on the companion Forms 2450-132, 2450-132A, and 2450-132B. Electronic and manual formats are available from the central office.

Detailed instructions regarding forest reconnaissance techniques, mapping terms and symbols, timber type and species codes, maps and plan styles can be found in the following sources: Chapter 100, Public Forest Lands Handbook ([2460.5](#)); Forest Tax Law Handbook ([2450.5](#)) and Manual Code [8625.2](#). Avail yourself of the many other resource management handbooks and databases produced by the Department and partner agencies.

### **Difference Between Landowner Objectives and Silvicultural Objectives**

The most difficult parts of plan writing often involve:

- **Identifying and expressing the landowner's objectives** (1H in the preceding Plan Standards Table). Keep in mind that the owner might not have clearly articulated objectives or might not have been aware of opportunities on the land. Look for opportunities throughout the planning process to educate the landowner and better define objectives. The owner's statement on an MFL application or other initial material is just a starting point. Don't be afraid to restate the owner's objectives in the plan. Encourage the owner to carefully consider the objective statement written in the plan. Refine the statement if it does not capture their concerns.

Occasionally, landowner objectives might not be consistent with sustainable forestry or be compatible with site capabilities. Foresters should discuss incompatible or impractical objectives with landowners and try to help them develop realistic objectives.

- **Identifying the silvicultural objective for each stand and how the objective will be reached** (2H in the Plan Standards Table). Silvicultural objectives for a stand are usually more specific than a landowner's overall objectives. Silvicultural objectives refer to particular regeneration harvest techniques, timber types and stand quality or structure the prescription is trying to achieve.

### **Forest Management Guidelines and Exceptions**

Under the framework established in [NR 1.213\(3\)b](#), Wis. Adm. Code, all forest management and timber harvesting assistance provided by DNR and Cooperating Foresters shall be consistent with BMPs and the silviculture sideboards in Table 2-1, [Wisconsin Forest Management Guidelines \(Publication FR-226 2003\)](#). The table summarizes the regeneration harvest systems that are generally recognized as acceptable and widely applied in Wisconsin. The designations are substantiated in forestry research literature and elaborated in the DNR Silviculture and Forest Aesthetics Handbook ([2431.5](#)).

Exceptions to the standards in FMG Table 2-1 will be granted only if a science-based management commitment describing an alternative method is submitted to and approved by the DNR in advance. Such management commitments shall describe the alternative method, measurable performance criteria and corrective measures that will be taken if the alternative fails. Management commitment variances to FMG Table 2-1 shall be evaluated locally between a DNR forester and cooperator or between a DNR forester and his supervisor, with progression to regional review if needed. (Resolution of management commitment exceptions at the local and regional level would usually occur in situations where the DNR Silviculture Handbook notes other possible management techniques which might not have been included as *generally accepted* practices in FMG Table 2-1.) In the event that a management commitment issue is not resolved at the region level, the Director of the Bureau of Forest Management shall review the proposal with the assistance of central office staff as assigned. (Sending a request for a silvicultural exception to the central office is required for precedent changing methods not described in the Silviculture Handbook or other authoritative publications.) *This system of exceptions does not supersede landowner eligibility or compliance requirements under MFL, cost sharing or other statutory programs.*

### **Follow-up on Management Prescriptions**

Though often neglected due to other workload, periodic follow-up is an important activity. Follow-up activity and accomplishment is an integral part of the primary forestry objective on private lands: that of providing the maximum yield of forest benefits. Without it, the program becomes a one-time contact with little continuity and minimum potential for realizing long-range forest management benefits. An organized follow-up system provides the forester with (1) a method to obtain feedback, (2) a way to improve relationships with the public, landowners and timber processors and, (3) an important opportunity to review and confirm silvicultural decisions.

#### **A. Short Term Follow-up**

As time permits, efforts should be made to visit sites of ongoing or recently completed practices. Such visits are valuable in determining if recommendations were proper and practical and give the forester a better understanding of on-the-ground limitations and conditions. All timber sales should be visited sometime during or after the cutting operation. Required performance checks for cost-sharing practices provides opportunity for good follow-up.

One effective system for short-range follow-up on recommendations is to locate timber sales, tree planting and TSI projects on a county map that can be carried in the vehicle. Such a map makes an excellent reference to locate areas to check as you make your rounds. Projects could be color-coded to show type of practice, when set-up, and if completed or underway.

**B. Long Term Follow-up**

Once a landowner has begun action on a forestry plan, the forester has a responsibility to encourage continued management on the land. This ensures the greatest return to the public on the initial investment of the forester's time already made and the full benefits of sustained yield management.

Foresters are encouraged to use the PlanTrac program for both tax law and non-tax forest management plan follow-up.